

IT Project Plan Instructions

FY06-07

This form is intended to provide an overview of an IT-related project with a primary focus on the technology components. This will assist the IMC and OIT in validating the proposed information and technology approach to support their roles in IT planning, project oversight, and procurement review.

Assumptions

Both the Commission on Information Management (IMC) and the Governor's Office of Innovation and Technology (OIT) encourage departments to scope all IT projects so that they fit into a single fiscal year.

In those few cases where a project must run across more than one fiscal year, departments should break such projects into separate and distinct phases, which themselves fit into a single fiscal year. Each of such phases should, individually, provide measurable benefits that are not dependent on subsequent phases. Each phase should be submitted as a separate project – on a separate IT Project Plan (ITPP).

Instructions

The following information components comprise the IT Project Plan (ITPP):

Section	Description
Fiscal Year (in form's title box)	Enter the appropriate fiscal year by replacing the "XX-XX" placeholder with specific numbers (e.g. "06-07" for base or supplemental request funded projects, "07-08" for change request or budget amendment funded projects).
1. Identifying Information	
Project Name	Provide the title of the IT project (this should be identical across all documentation – CC-IT, DITP, E&E, Schs 6-9, etc.).
Project Code	This code is comprised of 2 distinct components: <ul style="list-style-type: none"> • <i>Agency Code</i> – the 3-character (alpha) code used in COFRS; plus • <i>Project Code</i> – a 5-character (alphanumeric) code uniquely defined within an agency. If the department uses the COFRS Project Accounting Subsystem, this code should be identical in both places.
Department	Identify the department and, if applicable, the division by name (using format: Department / Division).
Primary IT System	Identify the department-given name of the primary IT system impacted by this project. Additionally, indicate whether this is a brand new system (being constructed from scratch) versus an effort to modify an existing system by placing an "X" in one OR the other box. NOTE: If this is an existing system, the name should match that provided on the IT Sch2000.
Project Funding	Indicate all types of funding sources supporting this project by placing an "X" in ALL of those boxes, which apply. Actual dollar figures are not necessary.
Base	The department's perennial funding base appropriation (portion received each year from potentially multiple sources including local, state, and fed govt.).
New – BA	That part of the department's incrementally new (beyond previous year's base) funding secured through the State's Budget Amendment process.

New – CR	That part of the department's incrementally new (beyond previous year's base) funding secured through the State's regular (Change Request) budgeting process.
New – NA	That part of the department's incrementally new (beyond previous year's base) funding secured through methods other than the State's various appropriation processes (Non-appropriated: e.g. gifts, grants).
New – Sup	That part of the department's incrementally new (beyond previous year's base) funding secured through the State's Supplemental process.
Associated IT Systems	Identify any other IT systems that this project will impact from a business, cost, or technical perspective. NOTE: These entries should match names provided on the IT Sch2000.
Project Contacts	Identify the following specific individuals (along with their contact information): <ul style="list-style-type: none"> • <i>Business Sponsor</i> – business manager with authority to make final decisions on the project (budget, schedule, scope). This is typically the owner of the business unit which primarily benefits from this IT project and/or resulting system; • <i>Department CIO</i> – Chief Information Officer for the department; • <i>Project Manager</i> – business or IT manager with authority to make decisions on project operations – day-to-day management of work breakdown structure (e.g. milestones, resource allocation, tasks).

2. Business Overview

Problem or Opportunity Definition (if no E&E attached)	<p>This section can be skipped if the targeted content is provided in a current, associated E&E (section 7.2) submission. Enter “see E&E.”</p> <p>Otherwise, the problem or opportunity should be defined in a way that conveys the magnitude, significance, scope, and timing (onset, frequency, or duration) of the business (not IT) issue. It is important that the definition does not presuppose a solution. It should be limited to several paragraphs.</p> <p>[For example, rather than define a service delivery problem as a lack of web access and real-time transactions for constituents, it may be defined as customer inaccessible and costly.</p>
Summary of Proposed Solution (if no E&E attached)	<p>This section can be skipped if the targeted content is provided in a current, associated E&E (section 7.3) submission. Enter “see E&E.”</p> <p>Otherwise, the summary of the request should identify the preferred alternative and highlight key business points to justify the request. It should be limited to several paragraphs.</p>
Benefits Overview	<p>Indicate <u>all</u> types of benefits expected from this investment by placing an “X” in ALL of those boxes, which apply.</p> <p>NOTE: Each benefit must have at least one corresponding performance measure (see below).</p>
Business Performance Measures	<p>The goal is to facilitate post-deployment tracking of how this project benefited the business. For each business benefit presented, in any associated documentation (e.g. section 2 above, E&E), to justify this proposed investment:</p> <ol style="list-style-type: none"> first, identify at least one measurement that will communicate business performance improvement over time; then, provide a current (previous and/or current fiscal year) baseline (pre-project) value for that measurement. <p>NOTE: It is critical that each measurement be focused on business performance and not on project status (e.g. not project-specific schedule, budget, scope) or HW/SW performance.</p>

3. Technology Overview

Proposed Technology	Provide a brief description of the technology components and/or efforts required by this proposed solution. It is not necessary to duplicate information already presented in the E&E or section 2 above. However it should be clear how the department's and/or enterprise's IT architecture will be altered and/or impacted.
Alternative Technology Considered	<p>This section can be skipped if the targeted content is provided in a current, associated E&E (section 7.5) submission. Enter "see E&E."</p> <p>Otherwise, provide a brief description of other technology solutions (e.g. custom-built vs. COTS software, product suite vs. best-of-breed, in-house vs. outsourced) that were evaluated and a brief explanation of why they were rejected.</p>
Architecture Review Score	<p>1) First, complete an "Architecture Review Scorecard" (ARS...available on the OIT web site) specifically focused on assessing this proposed solution's (not the entire department's) post-deployment architecture.</p> <p>a) In section #2 of the ARS ("Scope") mark the "Project" field.</p> <p>b) In section #3 of the ARS ("Target Name") provide the same entry as in section #1 of this ITPP ("Project Name").</p> <p>2) Then transfer the "percentage compliant" values from section #4 of the ARS ("Summary") to this table in the ITPP.</p>

4. Project Assessment

This section is comprised of 7 sub-sections, each of which has several questions. Please mark an "X" in only one of either the "Yes", "No", or "N/A" (not applicable) columns for each row. When either a "No" or "N/A" answer is given, please also provide a brief explanation (preceded by the question number for reference purposes) in the last row of that respective sub-section.

5. Estimated Procurements

This section is intended to identify all substantive procurement or purchasing activities associated with this project (by project stage).

NOTE: The provided table is an embedded MS Excel worksheet (double click to open and enter data).

For each procurement entry, the department should provide the following supporting-information:

A. Stage #	Select (via drop-down list generated from the State's gated process) the project stage this procurement will be associated with.
B. Product/service description	Provide sufficient summary description so as to clearly identify the procurement activity's objective. For network equipment this would amount to device type and model number, for software product's name and primary function, and for services project or task name.
C. COFRS Code	<p>Choose one of the provided (via drop-down list generated from the new "IT Chart of Accounts" published by the State Controller's Office) COFRS codes. If more than one code applies, either:</p> <ul style="list-style-type: none"> select the primary code (one that best sums the objective); or divide the single relationship into pieces, each represented on its own line (row). <p>NOTE: see "IT Chart of Accounts" for further explanation</p>
D. Type	Select (via drop-down list generated by OIT) the type that most closely reflects the procurement activity/strategy being pursued. For additional detail see the table below.

	If the activity is not one of the options, please contact OIT (itplanning@state.co.us).
Amount	E. Units: a) product: quantity b) services: hours/FTE, coverage (e.g. # of circuits), or subscription length (# of months)
G. Vendor	F. Dollars (\$) Enter the vendor name (not just a contact representative's name). If the department is using a reseller, please identify the Original Equipment Manufacturer (OEM) as well (e.g. "Software Spectrum / Microsoft").
H. Need Date	Provide the date that the department requires the specific product or service.
I. Solicit Date	Provide the anticipated date the procurement will be advertised on BIDS or otherwise conveyed to the potential vendor(s).
J. Renewal Date	Provide the anniversary date if the activity is a license, maintenance or agreement renewal.
K. Aggregation	Indicate whether the product or service is, in the department's mind, an appropriate candidate for: 1) aggregation with other departments' procurements and/or 2) consolidated as a common/shared service.

6. Enterprise IT Resources

Question #1 (contact)	Provide a separate "Yes" or "No" answer as to whether the department presented this project proposal to each of the organizations listed.
Question #2 (response)	Document responses the department received from each of the organizations listed (by providing a separate "Yes" or "No" answer to their ability to assist with each project stage).
Representatives	Identify at least one specific individual at each organization listed with whom this project was discussed (along with their contact information)

Procurement Types

Type	Description
RFP	Request for Proposal
IFB	Invitation for Bid
DQ	Documented Quote
PAgrmt-WSCA	Price Agreement – facilitated through Western States Contracting Alliance (WSCA)
PAgrmt-other	Price Agreement – facilitated through some other organization (e.g. State Purchasing, US GSA)
Renewal	Renewal of existing contract that stipulates renewals
Amendment	Amendment to an existing contract
Task Order	Execution under an existing contract that stipulates the use of task orders
Sole Source	Non-competitive selection of a product or service provider
Svcs < \$25k	Communication and information technology services that amount to less than \$25,000
HW < \$5k	Communication and information technology hardware that amounts to less than \$5,000
SW < \$5k	Software that amounts to less than \$5,000